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Chief Administrative Officer

August 31, 2004

To: Supervisor Don Knabe, Chairman
Supervisor Gloria Molina
Supervisor Yvonne B. Burke
Supervisor Zev Yaroslavsky
Supervisor Michael D. Antonovich

From: David E. Janssen
Chief Administrative Officer

PROPOSITION 67 – 911 EMERGENCY AND TRAUMA CARE ACT INITIATIVE – INFORMATION ABOUT CELL PHONE USE

At the Board meeting of June 29, 2004, you asked my office to review information about the possible effects of the proposed tax on cell phone users under the 911 Emergency and Trauma Care Act Initiative, which is Proposition 67 on the November ballot. Specifically, we were asked to review statistics provided to members of the Board regarding the characteristics of cell phone users, and whether or not a disproportionate number of young people use cell phones; and whether or not there is a disproportionate number of African-Americans who use cell phones as their primary phone; and report back to the Board if it is found that there are other statistics contrary to those currently available.

Cell Phone Use Information

The information that we have been asked to review are two market research reports supplied by the opponents of the initiative.

One study, based on a telephone survey of Michigan residents, notes that African Americans and whites have high percentages of cell phone ownership of 77 percent and 73 percent, respectively. A higher proportion of Michigan African Americans than whites (28 percent to 9 percent) reported their cell phone as their primary phone. The study also notes that about 25 percent of respondents under the age of 25, and 21 percent of those aged 25-34 report their cell phone as their primary phone. To the extent the consumer behavior found in Michigan is the same as in California, it is reasonable to infer that some African Americans and some young people, because of their cell phone use, will be more affected by the proposed tax than their peers who rely on residential (home) phones. Relevant excerpts from this report can be found in Attachment I.

The other study relates to cell phone use among Hispanics nationally. The study found that their cell phone bills are 10 percent higher than the national average, but that the percentage of Hispanic households with cell phones is on par with other segments of the population. Additional information is contained in Attachment II.

Thus far, my office has been unable to locate any California-specific information similar to the above. However, the impacts of the proposed tax need to be weighed against the benefits of the initiative in supporting emergency and trauma care services, particularly safety net hospitals which have higher numbers of uninsured and non-white patients. Specifically, according to a May 2004 report by the Federal Centers for Disease Control and Prevention, 51 percent of the patient mix in high burden safety net hospitals is attributable to Medicaid and uninsured patients. According to the 2001 California Health Interview Survey, the County's African Americans comprise 12.9 percent of the Medi-Cal caseload under age 65, compared to about 7.8 percent of the overall population under age 65, and persons aged 18-29 comprise 30 percent of the uninsured, despite being only 20 percent of the overall population.

If you have any questions or need additional information, please let me know, or you may contact Jonathan Freedman at (213) 974-1643.

DEJ:GK
MAL:JF:ib

Attachments

c: Executive Officer, Board of Supervisors
County Counsel
Director of Health Services

Attachment I

gov edu

net org

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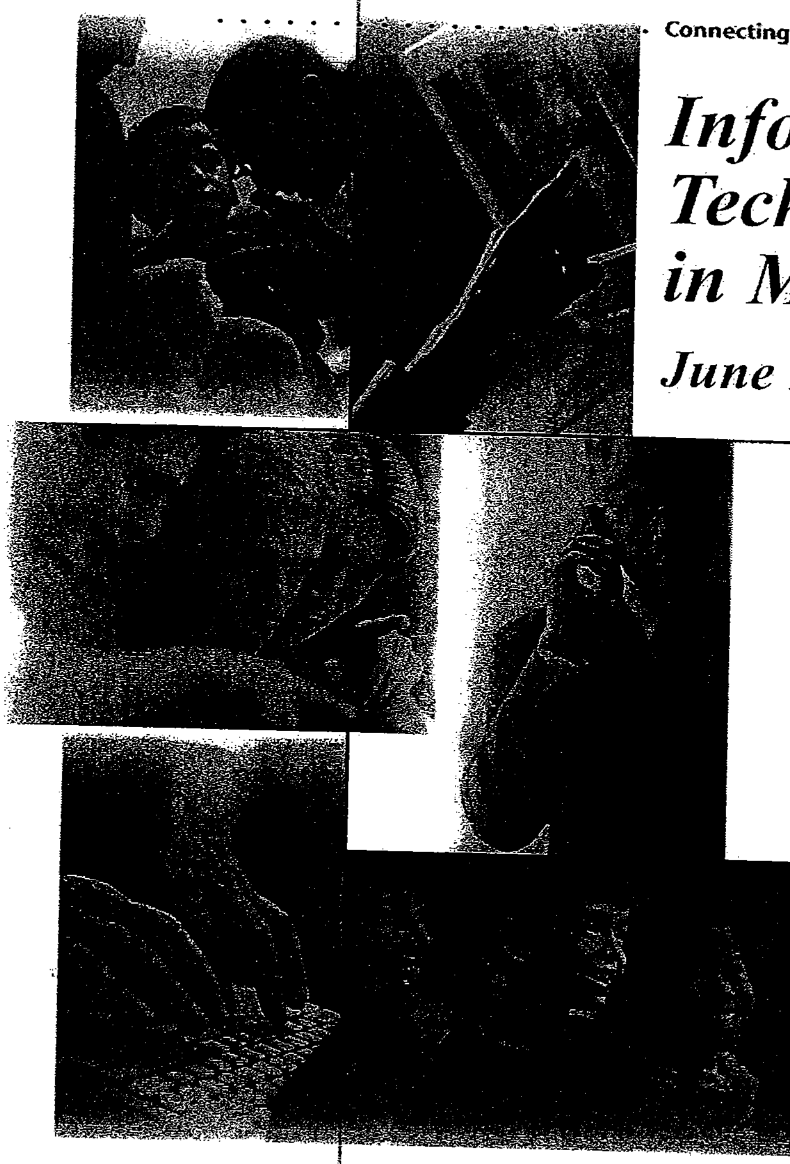
cyberstate.org

Connecting the Dots in Michigan



Information Technology in Michigan

June 2004

Funded in part by the W. K. Kellogg Foundation

W.K. KELLOGG FOUNDATION

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cyber-state.org
www.cyber-state.org

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www.pscinc.com

Information Technology in Michigan:

Findings from cyber-state.org 2004 Surveys

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Prepared for
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Ann Arbor, Michigan
www.cyber-state.org

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Introduction and Methodology

Cyber-state.org (*www.cyber-state.org*) is a nonprofit group established in 1998 by Michigan's business, education, health care, government, and philanthropic communities, including the W. K. Kellogg Foundation, the Council of Michigan Foundations, and the Herbert H. and Grace A. Dow Foundation. Since 1998, cyber-state.org has been working within the Altarum Institute, an Ann Arbor–based research and innovation institution. Cyber-state.org's vision is to help Michigan become a world leader in developing and using information technology in ways that better the life of every citizen.

Cyber-state.org commissioned a survey of Michigan residents to explore the role that information technology plays in their lives. The 2004 survey is the fifth in the cyber-state.org series; previous surveys were conducted in 2002, 2001, 1999, and 1998. The survey series was developed and conducted by Public Sector Consultants Inc. (www.pscinc.com) and has three components:

- A random telephone survey of 800 Michigan residents aged 18 and older from across the state, having an overall margin of error of ±3.5 percent with 95 percent confidence.
- A telephone survey of 200 additional respondents across seven of the eight Michigan regions (see Appendix A), conducted to ensure that whenever regional variations are discussed, the margin of error for the results in the different regions is not greater than ±10 percent with 95 percent confidence.
- An Internet survey of online Michigan residents to gather more detailed information about how they use the Internet. E-mailed invitations were sent to 14,881 people who expressed an interest in receiving Internet surveys, and 2,000 people responded. As explained in that section, these responses are not necessarily representative of the universe of online Michigan residents.

The surveys were conducted between April 7 and April 14, 2004[1]. Where appropriate, the survey results were weighted using information from the 2000 United States Census to reflect the Michigan population as accurately as possible (see Appendix B). The telephone and Internet surveys are provided in Appendices C and D, respectively.

The 2004 report references surveys conducted in previous years. In addition to generic caveats about comparing trend survey results, readers should also be aware that the 1998 and 1999 surveys were weighted (when appropriate) to the 1990 Census, while the 2001, 2002, and 2004 surveys were weighted to the 2000 Census.

[1] No calls were made on April 9-10, which was Easter weekend.

Major Findings

- Computer ownership is statistically unchanged from the 2002 survey. However, when viewed across the five surveys conducted between 1998 and 2004, computer ownership has increased in Michigan, rising from 54 percent of all households in 1998 to 70 percent this year.
- Race, presence of children in the home, and educational attainment all continue to be related to computer ownership.
- When asked why they did not have a computer at home, a majority of respondents now cite either cost or lack of desire as the greatest barriers to computer ownership. Expense is more often cited as a barrier by younger respondents; older respondents more often cite simply not wanting to have a computer at home.
- Most respondents report at least one cellular phone in the household (73 percent), an increase of 10 percent from the 2002 survey. Since 1998, the number of respondent households without a cellular telephone has dropped nearly in half—from 49 to 27 percent—a rate of growth *twice* as fast as the growth of computers in the home.
- As was the case in the 2001 and 2002 surveys, ownership of cell phones is higher in both the City of Detroit and Metro Detroit than in other regions of the state. However, in 2004 whites have increased their cellular telephone ownership to be statistically identical to that of African American respondents (77 and 73 percent, respectively). In 2002, more African Americans reported owning a cell phone (76 percent) than did whites (61 percent).
- The switch to cellular telephones as the "main" telephone over a landline is well underway in Michigan. Nearly one-quarter of respondents under the age of 25 (25 percent) and aged 25–34 (21 percent) report their cellular phone is their primary number, a rate at least twice as high as in any other age group. African American respondents were three times as likely as whites to report that their cellular phone is their primary number (28 and 9 percent, respectively).
- The percentage of respondents who have accessed the Internet at some point in their life has increased from 45 percent in 1998 to 70 percent in 2004.
- When respondents were asked why they had not used the Internet, the primary reasons were lack of access to the Internet (32 percent) and that the Internet was not worth the time, hassle, or expense (27 percent). In a change from last year, the percentage of respondents believing the Internet is too complicated decreased from 22 percent to 12 percent.
- The majority of respondents with Internet access at home continue to access the Internet via modem (54 percent); however, an increasing number report using DSL or cable modem connections. The overall increase in DSL and cable modem access between 2001 and 2004 is 25 percent.
- Nearly two-thirds of all online Michiganders have made at least one purchase over the Internet (60 percent), a nearly fivefold increase from the first survey in 1998 (11 percent). In addition, this year's survey marks the first time that the percent of Michigan residents who have made at least one Internet purchase (42 percent) outnumbers the number of Michigan residents who have never been online (30 percent).
- Nearly one in five (19 percent) Internet respondents had used a handheld computer or a cellular phone to access the Internet. Wireless access appears to be used actively by only a

small segment of all online users. However, given the penetration of cellular phones and the interest in increasing wireless access points, this percent is likely to rise substantially in coming years.

- The 2004 survey reveals that nearly twice as many Internet respondents have accessed the state's website as in 2002 (76 and 40 percent, respectively). There was also a clear preference by respondents—matching the substantial increase in use of the state's own portal, *michigan.gov*—for government services delivered via a portal. More than two-thirds of Internet respondents (69 percent) said they would make greater use of government services if a single site linked local, state, and federal information or access to information.
- Interest in voting either by mail or the Internet in the weeks prior to an election has decreased since 2001. In both 2001 and 2002, a majority of Michigan residents preferred to vote somewhere *other* than a voting booth on election day. In 2004, however, there is no majority for any response; the plurality would prefer to vote in a booth on election day (49 percent) compared to either Internet or mail voting in the weeks prior (47 percent combined).
- The previous survey (2002) marked the first time that a majority of the Michigan public—regardless of whether or not they had ever used the Internet—were "very concerned" that information they gave to a computer-based service or website would not be kept confidential; Internet respondents were not as concerned overall. This year, a majority of **all respondents**—public and Internet—report being "very concerned."
- Michigan residents continue to express a desire for online government services in theory, but are wary of the practice. As in previous years, a majority of respondents—regardless of survey type or year—believe that public information held by government data about people (property tax records, marriage records, etc.) should *not* be available online. The public is also split on the rules of access to property tax records, with nearly equal proportions believing online access should have no limits versus having built-in limits as to the quantity of data available for review/download.
- However, Internet respondents looked much more favorably on governments combining information held by governments than on businesses combining information from other businesses to create a "single view" of a person or customer.
- Nearly all Internet respondents (96 percent) believe that spam is either annoying or a serious problem on the Internet, and nearly two-thirds (63 percent) believe spam is a serious problem. Attitudes toward spam are relatively unaffected by any demographic characteristic.
- Overall, respondents in 2004 are no more likely to believe that the Internet needs content regulation greater than that of TV or newspapers than they were in 2001; respondents also report being equally concerned about the balance of security between the loss of legal and privacy rights and the threat of terrorism.

Trend Data:
Michigan Households and the Internet

Most of the analysis in this section is based on the **telephone** survey of all Michigan residents, as the telephone survey was constructed to represent all Michigan residents aged 18 and older. Responses from the Internet survey are noted.

DEVICES IN THE HOME

Computer Ownership

Computer ownership is statistically unchanged from the 2002 survey. However, when viewed across the five surveys, computer ownership has increased in Michigan, rising from 54 percent of all households in 1998 to 70 percent this year (see Exhibits 1,2).

- As in previous years, computer ownership is negatively related to the respondent's age; that is, as age increases, computer ownership decreases. While 74 percent of respondents aged 25 and younger own computers, only 48 percent of respondents aged 65 and older do. If growth rates continue, however, the 2004 survey likely marks the last time that a majority of respondents aged 65 and older will not have a computer.
- Respondents by age with the most computers are those younger than age 45, where approximately one-third have more than one computer in the home. Respondents at the top of this band (ages 35–44) had the highest rate of computer ownership overall; 86 percent had at least one computer in the home.
- Geographically, computer ownership is statistically unchanged from the 2002 survey with three exceptions:
  - The percent of respondents in Metro Detroit with no computers at home has decreased from 26 to 15 percent.
  - The percent of respondents in the Thumb region with two or more computers at home has increased from 18 to 30 percent. Similarly, the percent of respondents in the Upper Peninsula with two or more computers at home increased from 11 to 21 percent.
- The majority of respondents to the Internet survey report having one computer (52 percent); nearly twice as many Internet respondents have two or more computers at home compared to the Michigan population as a whole (46 and 26 percent, respectively).

EXHIBIT 1
Number of Computers in the Home

Year	None	One	Two or more
2004	30%	44%	26%
2002	34	45	21
2001	44	39	16
1999	36	44	20
1998	46	40	14

SOURCE: Public Sector Consultants Inc.

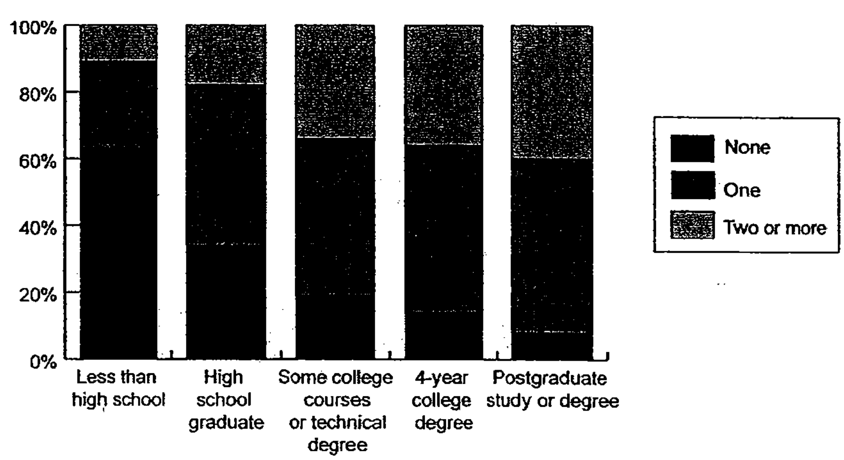
EXHIBIT 2
Home PC Ownership, by Region

Region	No computer	One computer	Two or more computers
City of Detroit	49%	33%	18%
Metro Detroit	15	50	35
Southern	25	44	31
Western	32	45	23
Central	28	40	32
Thumb	33	37	30
Northern Lower Peninsula	35	49	16
Upper Peninsula	30	50	21

SOURCE: Public Sector Consultants Inc.

- Race, presence of children in the home, and educational attainment all continue to be related to computer ownership.
  - Forty-one percent of African American respondents do not have a computer at home compared to 28 percent of white respondents. This is a slight improvement from 1999, when the comparable figures were 48 and 36 percent, respectively.
  - Nearly twice as many respondents without children at home do not have a computer as respondents with children (35 and 18 percent, respectively).
  - The educational attainment of the respondent is strongly related to computer ownership. As education increases, the percent without a computer in a home decreases from 63 percent of those without a high school diploma to 8 percent of those with postgraduate study or degree (see Exhibit 3).

EXHIBIT 3
Computer Ownership, by Education Level



SOURCE: Public Sector Consultants Inc.

When respondents were asked why they did not have a computer at home, most respondents give the same answer as in 2002—a computer is either too expensive (32 percent) or they do not want a computer at home (36 percent). The greatest change is that the combined percentages of these answers is 20 percent higher than in 2002 (68 percent compared to 48 percent in 2002), meaning a majority of respondents now cite either cost or desire as the greatest barriers to computer ownership (see Exhibit 4).

EXHIBIT 4

Why Don't You Have a Computer at Home?

Reason given	2004	2002
Too expensive	32%	25%
Do not want a home computer	36	23
Too hard to learn and use	7	16
No time to use a home computer	6	15
Can use a computer somewhere else	12	14
Don't know	7	6
Another reason	—	1

SOURCE: Public Sector Consultants Inc.
NOTE: Asked only of people without a computer at home.

- Expense is more often cited as a barrier by younger respondents; older respondents more often cite lack of desire. Nearly two-thirds of respondents younger than age 35 cite expense, while only one-third (32 percent) of respondents age 55 and older believe the same. Lack of desire is named by nearly half (49 percent) of respondents aged 55 and older, compared to 7 percent of respondents under age 35.
- There is no statistical difference in answers based on race, marital status, or gender.
- As in 2002, twice as many parents of school-age children (52 percent) as respondents without school-age children (26 percent) believe a computer is too expensive.
- Internet respondents name expense as the primary barrier to computer ownership (41 percent). But unlike Michigan residents as a whole, Internet respondents name second the lack of time to use a computer at home (31 percent); lack of desire is named by less than one percent of Internet survey respondents.

Cellular Telephones

Most respondents reported a cellular phone in the household (73 percent), an increase of 10 percent from the 2002 survey. Since 1998, the number of respondent households without a cellular telephone has dropped nearly in half—from 49 to 27 percent—a rate of growth *twice* as fast as the growth of computers in the home (see Exhibit 5).

As was the case with computers, presence of a cellular telephone is related to age and educational attainment. However, unlike computer ownership, a *majority* of all ages and educational levels report having at least one cellular phone in the home. Cellular phone ownership decreases with age (93 percent of respondents under age 25 have at least one cellular telephone in the home, compared to 54 percent of respondents aged 65 and older), but increases with educational attainment (56 percent of respondents with less than a high school diploma to

86 percent with postgraduate study or degree.) Nearly two-thirds (59 percent) of youngest respondents report having *two or more* cellular telephones at home.

Interestingly, there was only a small statistical difference between the cellular telephone ownership reported by Internet respondents versus the Michigan population as a whole; 18 percent of Internet respondents do not have a cellular phone, compared to 27 percent of all Michigan residents.

EXHIBIT 5
Number of Cellular Telephones in the Home

Year	None	One	Two or more
2004	27%	33%	44%
2002	37	31	32
2001	39	30	31
1999	43	36	21
1998	49	33	19

SOURCE: Public Sector Consultants Inc.

As was the case in the 2001 and 2002 surveys, ownership of cell phones is higher in both the City of Detroit and Metro Detroit than in other regions of the state. However, in 2004 whites have increased their cellular telephone ownership to be statistically identical to that of African American respondents (77 and 73 percent, respectively). In 2002, more African Americans reported owning a cell phone (76 percent) than did whites (61 percent).

EXHIBIT 6
Cell Phone Ownership, by Region

Region	No Cell Phone	One Cell Phone	Two or More Cell Phones
City of Detroit	12%	53%	35%
Metro Detroit	14	31	55
Southern	20	35	45
Western	32	32	37
Central	31	23	46
Thumb	28	37	35
Northern Lower Peninsula	39	40	21
Upper Peninsula	42	30	28

SOURCE: Public Sector Consultants Inc.

The greatest changes in ownership by region between the 2002 and 2004 surveys are:

- The percent of respondents in the City of Detroit *without* a cellular phone decreased from 30 to 12 percent. Similarly, the percentage of respondents in the Southern region without a cellular telephone decreased from 37 to 20 percent.
- Respondents in the City of Detroit with at least one cellular phone increased from 27 to 53 percent.

- Respondents with two or more cellular phones increased substantially in Metro Detroit (38 to 55 percent), Western (25 to 37 percent), Central (34 to 46 percent), and the Upper Peninsula (16 to 28 percent).

Respondents to both the telephone and Internet survey were asked which they considered to be their primary telephone number: their traditional, "land line" telephone or their cellular telephone.

- Nearly one-quarter of respondents under age 25 (25 percent) and aged 25–34 (21 percent) report their cellular phone is their primary number, a rate at least twice as high as in any other age group.
- African American respondents were three times as likely as whites to report that their cellular phone is their primary number (28 and 9 percent, respectively).
- There is no statistical difference between the Michigan population at large and the universe of online Michigan residents (87 percent each) who name their home phone as their primary number, or who name their cellular phone primary (12 and 11 percent, respectively). This may be due to sampling bias of the telephone survey: by practice and by law, survey research companies must exclude cellular telephone exchanges from random dialing patterns because the cost of the call is borne by the cellular telephone user ("receiver pays," as opposed to a typical landline-to-landline call where the "caller pays"). Therefore, finding that only one in ten Michigan residents believes their cellular phone is their primary phone is likely understated.

EXHIBIT 7

What Do You Consider Your Primary Telephone Number?

Primary Phone Number	All Michigan Residents (telephone)	Internet Users (telephone)	Internet survey
Home/landline	87%	87%	73%
Cellular	12	11	14
Depends on who is calling	0	1	8
Both/either	1	1	5
Some other number	0	1	0

SOURCE: Public Sector Consultants Inc.

When asked why they do not have a cellular telephone, respondents in nearly equal proportions name not wanting a cellular phone (38 percent) as name believing their landline phone is the only service they need (34 percent). Roughly half as many name the expense of cellular phone service as the primary barrier (19 percent). Internet respondents, however, named expense as the primary barrier (41 percent), with landline service (27 percent) and lack of desire (21 percent) sharing second position.

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HISPANICS' CELLULAR BILLS ARE 10 PERCENT HIGHER THAN THE NATIONAL AVERAGE

Hispanics Also Spend More on Local and Long Distance Telephone Services and Are More Likely To Switch Cell Phone Carriers

NEW YORK (February 18, 2004) – Scarborough Research, a leader in identifying the shopping, media and lifestyle patterns of consumers in the United States, released a study which found that Hispanics spend more on their monthly household cellular phone service than the national average. According to the study, the average monthly household cellular bill for Hispanics is $67, which is more than 10 percent higher than the national average of $60. Nationally, 64 percent of Hispanics live in a household with a cellular phone subscription. This is virtually equal to the national cell phone penetration rate of 66 percent.

Hispanics also report spending more on their monthly household long distance and local telephone service bills. The average household long distance bill for Hispanics is $33 versus $27 for all consumers. Hispanics average $36 per month for local service which is slightly higher than the national average of $34.

Nineteen percent of Hispanic consumers who said they or a member of their household subscribes to wireless service plan to switch carriers in the next year. They are 22 percent more likely than all wireless subscribers to do so.

"Hispanics are consuming products and services at a rate equal to, and, in certain instances, greater than the general population. These consumers, characterized as the 'largest minority group' in the 2000 Census, are in fact a consumer force to be reckoned with," said Bob Cohen, Ph.D., President and CEO, Scarborough Research. "In the case of telecom, Hispanics tend to place great value on social and family ties, which makes being connected very important. This cultural nuance places Hispanics among the telecom industry's best customers."

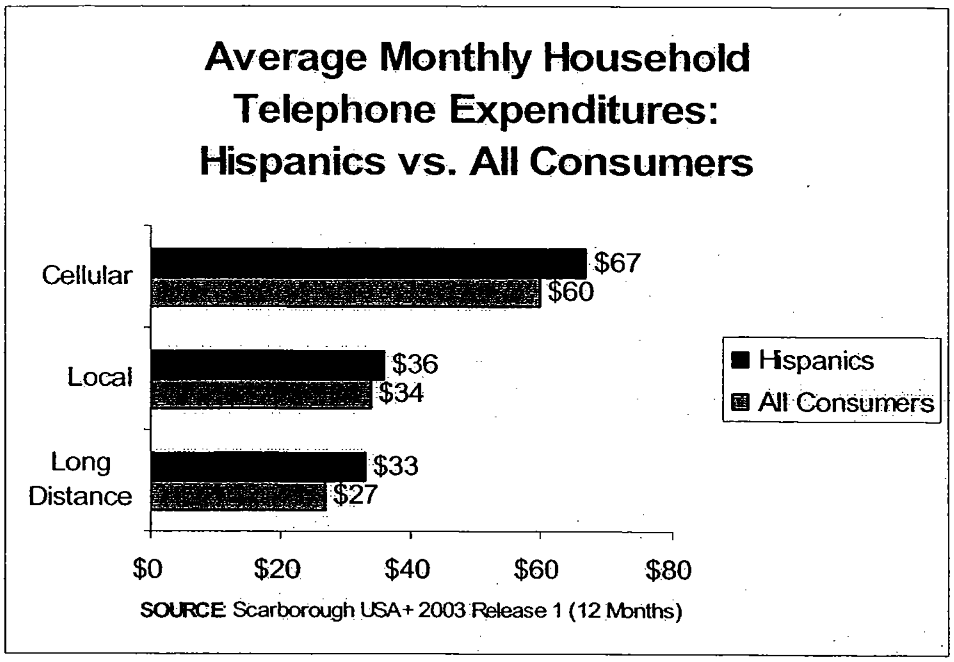
Hispanics are 24 percent more likely than all consumers to have spent $150 or more on their monthly household cellular bill last month. They are 86 percent more likely than all consumers to spend $100 or more on their monthly long distance service and 41 percent more likely to spend $100 or more on their monthly local phone service.

The Scarborough study also found local market differences when it comes to household cell phone penetration among Hispanics. Miami and New York lead local Hispanic markets* in cell phone penetration. Seventy-four percent of Hispanics in Miami and 71 percent in New York said they or a member of their household subscribes to cellular service.

"The growth of the Hispanic marketplace in the U.S. is a national phenomenon, but marketing to these consumers requires a local focus," said Dr. Cohen. "Cultural differences, shopping patterns and language preferences are important factors that distinguish Hispanic segments and these are driven at the local market level. Through better understanding Hispanics where they live, marketers can maximize their multicultural budget, make more informed media decisions, streamline the marketing process and expand their brand's reach."

Data in this report is from Scarborough USA+ 2003 Release 1. The 2003 data on switching carriers is from Release 1 and represents six months of measurements. The other 2003 data represents 12 months. DMA is a registered trademark of Nielsen Media Research. All other trade names are the property of their respective owners. Charts follow.

*Hispanic markets are defined as those DMAs which have 10 percent or more adults who define their ethnicity in the Scarborough study as "Spanish/Hispanic."



Scarborough Hispanic Local Market* Analysis:
Cell Phone Penetration Among Hispanic Consumers**

DMA ®***	%
Miami/Ft.Lauderdale	74%
New York	71%
West Palm Beach/Fort Pierce	71%
Austin	70%
Fort Myers/Naples	68%
Sacramento/Stockton/Modesto	68%
Denver	68%
Orlando/Daytona Beach/Melbourne	67%
Albuquerque/Santa Fe	67%
San Francisco/Oakland/San Jose	66%
Honolulu	66%
San Antonio	65%
Houston	64%
Phoenix	64%
Los Angeles	63%
Tucson	61%
El Paso	61%
San Diego	60%
Dallas/Fort Worth	59%
Chicago	58%
Fresno/Visalia	58%
Las Vegas	57%

SOURCE: Scarborough USA+ 2003 Release 1 (12 Months).
*Hispanic Local Market = DMAs which have 10 percent or more adults who define their ethnicity in the Scarborough study as "Spanish/Hispanic."
**Cell Phone Penetration = Percent of Hispanic consumers 18+ who said they or a member of their household subscribes to cellular/wireless service.
***DMA® is registered trademark of Nielsen Media Research. All other trade names are the property of their respective owners.

About Scarborough Research

Scarborough Research is a leader in identifying local, regional and national shopping patterns and media usage for the American consumer. Scarborough provides data solutions and media strategies for today's complex marketing challenges. Our data helps our clients acquire and retain customers and better distinguish their brands. Scarborough offers studies that focus on Hispanics, including a multiple market study of the nation's most densely populated Hispanic areas as well as local market Hispanic studies. Scarborough's 3,500+ subscribers rely on the company's data to acquire and retain customers, expand the reach of brands, increase sales and roll out new markets. Surveying more than 200,000 adults annually, Scarborough measures adult consumers in the local markets where they live. Scarborough Research is a joint venture between Arbitron Inc. and VNU Media Measurement & Information. For additional information, please log on to www.scarborough.com.

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This press release is available on the Scarborough web site at www.scarborough.com and the KCSA Web site at www.kcsa.com.